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Workforce Management Web for Supervisors Help

Configuring Profiles

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Configuring Profiles

Profiles are descriptions of virtual agents.



You can configure multiple profiles for each contract by selecting typical sets of skills. The WFM Scheduler uses contract parameters, combined with the profiles' skill sets, to produce blank schedule scenarios that are based on profile characteristics rather than on the actual agent pool. This is especially useful if you have not yet hired agents.

These blank schedule scenarios provide you with an unlimited number of "what-if" assessments of the number of agents of each contract and skill set that might be required. You can manually assign agents into the schedule after it is built.

You can **create a new profile** or **copy an existing profile** and rename it to create a new one, or you can **delete a profile**.


Creating a Profile

To create a new profile:

1. Click **Policies > Contracts** and then, in the **Objects** pane, select a site.
 2. In the **Contracts** pane, select a specific contract.
The **Constraints** pane displays, by default.
 3. At the top of the pane, select **Profiles**.
A list of profiles that have been created for this contract displays.
 4. In the **Profiles** pane, to create a new profile, click **Add Profile** .
 5. When the **Profile Properties** opens, enter a name for the profile.
The name should be descriptive and different from any other profile name within the contract.
 6. To add skills to the profile, click **Add Skill** .
- A list of available skills is displayed in the **Selected Skills to be Associated With Profiles** section.

Tip


Alternatively, if you want to remove a skill, click **Delete Skill** .

7. Select the skills you want to associate with this profile, and then, click **Add Skill** .
8. In the **Use this Level for Assignments** field of the **Available Skills** pane, enter the correct skill level.

Important

The value that you enter will affect the profile's availability on the **Select Profiles** page of the **Schedule Scenario Wizard**. That page displays only profiles with a skill level that falls within the required range of the **Activities** that you are scheduling. For example, if you define a profile here with a Stocks & Bonds skill level of 5, and then use the wizard to create a scenario that requires a Stocks & Bonds skill level of 8-30, your profile will not appear as a choice, because 5 is not between 8 and 30.


9. Continue to add skills and set skill levels until you have fully configured the profile.

10. To save the profile setting, click **Save Changes**  .

Deleting a Profile

To delete an existing profile:


1. Click **Policies > Contracts** and then, in the **Objects** pane, select a site.
2. In the **Contracts** pane, select a specific contract.
The **Constraints** pane displays, by default.
3. In this pane, select **Profiles**.
A list of profiles that have been created for this contract displays.

4. In the **Associated Profiles** section, select the profile you want to delete and click **Delete Profile**  .
The profile is removed from the list.

5. To save the changes, click **Save Changes**  .

Copying an Existing Profile

To create a new profile by copying an existing profile:

1. In the **Policies > Contracts > Profiles** pane, select an existing profile in the **Associated Profiles** section.
2. Click **Copy Selected Profile**  .
The **Copy Selected Profile To Another Contract** pane displays.
3. In the **Name** field, rename the profile.
4. In the **Copy Selected Profile to Another Contract** section, select a contract from the list.

Tip

Alternatively, if you know the **Contract** name, you can type it in the **Search** field to find it quickly.

5. Click **Save Profile** .

The profile is added to the list of **Associated Profiles**.

Tip

If the contract you selected in [step 4](#) is different from the contract selected in [step 1](#), the copied profile is visible only after you navigate to the list of profiles under the appropriate site for this contract. If the contract selected in [step 4](#) is the same, the copied profile is visible in the profile list immediately after it is copied.

6. Configure the profile. The settings are described in [steps 7-10](#) above.